EXERCISE 14.   SET UP ESG ACTIVITY: SHELTER RENOVATION

✎ *Setting up ESG activities initially involves the same steps as setting up activities using any other entitlement grant. For a full explanation of navigating through the IDIS screens for setting up an activity, refer to the **KeyStroke Saver**.*

✎ *After typing data in the "common path" screens, entering the amount in the TOTAL ESTIMATED AMOUNT field and an "X" next to the ESG field on the "MONEY" screen, you then proceed down a set of program specific screens. In ESG there is a series of screens on which information about the ESG Project is to be reported. Unlike CDBG and HOME, HUD wants ESG reports on the PROJECT, not on each activity that may be set up under an ESG PROJECT. For example, the project may be a particular shelter and you may set up activities for each type of service provided at the shelter such as operating or counseling. However, you would add up the accomplishments for all of the activities and record them under just one activity. There are 4 eligible ESG activities. When setting up ESG activities you may want to label them with the project name.*

Setting Up An ESG Activity

1. At the MAIN MENU, proceed to the first setup screen. Press <**F2**> to bring up a list of projects.

2. Select a Project under which you can set up an ESG activity. When you return to the "SETUP ACTIVITY" screen, <**Tab**> to the ACTIVITY NAME field and type in a name for your activity that indicates you are renovating the Shelter. Fill out the rest of this screen and move to the second activity setup screen.

3. Check the HUD MATRIX CODE (<**F1**> or **KeyStroke Saver**) to ensure it is the most appropriate one for this activity. Answer the program income and environmental questions appropriately.

4. Check the questions regarding the homeless and HIV/AIDS and provide appropriate responses.

5. At the OTHER ENTITY field, **type** "N." Save your work and move to the third activity setup screen.

6. Under ACCOMPLISHMENT DATA, press <**F1**> at the PROPOSED field, and select an appropriate choice. Think of this entry as the "executive summary" in which you give HUD, Congress, and others a general concept of the number of people that will be served by the project under which you are setting up this activity. **Type** in the number of people that you expect will be served by this project. Save and move to the "Money" screen.

7. Enter $50,000 in the TOTAL ESTIMATED AMOUNT field. Save your work and move to the "ESG HOUSING AND SERVICES" screen.

  🖉 *This screen and the following ESG screens do not indicate an activity number or name. HUD expects ESG grantees to report information once for each project even if there are several activities set up under the project. Thus, the following screens should be filled out under one of the activities being carried out for an ESG project and left blank for the others.*

8. Make appropriate entries on this screen. It may be filled out at an early stage since it indicates the purposes of the shelter and the types of services to be carried out in the shelter. Save your work and move to the first of three "ESG BENEFICIARIES" screen.

9. This screen may only be filled out after a shelter has been in operation. It may be left blank at the time an ESG activity is set up or, if the shelter is already in operation, it may be possible to fill it out. After **typing** in any data, save your work and move to the second "ESG BENEFICIARIES" screen.

10. This screen involves age, gender and family status of ESG beneficiaries. It may be left blank if this information is not known. Move to the third "ESG BENEFICIARIES" screen.

11. This screen requests information on the proportions of ESG beneficiaries experiencing various conditions and adversities such as battered spouses, chronically mentally ill and others. Move to the "ESG HOUSING" screen.

12. This screen provides an opportunity to report on ESG HOUSING. If the shelter is in operation, report on the number of persons in various types of housing (e.g., barracks, group homes, scattered site apartments). Otherwise, it may be left blank. Move to the "ESG FUNDING" screen.

  🖉 *The final screen is for reporting ESG FUNDING. This can be filled out at an early stage and refined as changes occur in the amount of funding for the shelter from various sources (ESG, Public, Private). The field for ESG funds is blank at this time and data cannot be entered by you. However, you can enter the rest of the financial information on this screen, and, remember, HUD wants it to reflect the total for the project, not just for this activity. IDIS reports can fill in the total amount of ESG funds set up for various activities under this project.*

13. **Type** in funding data for this project. Save your work and move to the "Money" screen. You have completed all of the ESG setup screens. Return to the MAIN MENU.

14. **Type** "I" and press <**Enter**> to get into the "ACTIVITY FUNDING MENU" screen and then **type** "02" and press <**Enter**> to go to the "ACTIVITY FUNDING LIST" screen to commit the funds. Or you could **type** "I 02" at the MAIN MENU which would be the fastest way to get to the "ACTIVITY FUNDING LIST" screen.

15. Press <**F2**> to see the list of CPS Projects, select the appropriate project and press <**Enter**>. Press <**Enter**> again to see the list of all activities established under the project that you have selected. Or you could type in the HUD Activity Number, press <**Enter**> and then proceed to step #17.

16. Select an activity and press <**Enter**>.

17. Select the program that you want to fund this activity and press <**Enter**>.

18. Type in the program year and amount. Press <**Enter**> to save.

19. Return to the MAIN MENU.

Setting Up A Second ESG Activity

1. At the MAIN MENU, proceed to the first setup screen. Press <**F2**> to bring up a list of projects.

2. Select a Project under which you have already set up an ESG activity. When you return to the "SETUP ACTIVITY" screen, <**Tab**> to the ACTIVITY NAME field and type in a name for your activity that indicates you are doing outreach. Fill out the rest of this screen and move to the second activity setup screen.

3. Check the HUD MATRIX CODE (<**F1**> or *KeyStroke Saver*) to ensure it is the most appropriate one for this activity. Answer the program income and environmental questions appropriately.

4. Check the questions regarding the homeless and HIV/AIDS and provide appropriate responses.

5. At the OTHER ENTITY field, **type** "N." Save your work and move to the third activity setup screen.

6. Select the appropriate choice for the ACTIVITY STATUS CODE. Under ACCOMPLISHMENT DATA, you will not enter information. If you need to update the project accomplishment data you entered under the initial activity for this project, you will be able to do so later in the exercise. Save and move to the "Money" screen.

7. Fill out the appropriate fields and enter an appropriate amount in the TOTAL ESTIMATED AMOUNT field. Save your work.

   ✎ *The following ESG screens do not indicate an activity number or name. HUD expects ESG grantees to report information once for each project even if there are several activities set up under the project. Thus, the following screens should be filled out for one of the activities being carried out under an ESG project and left blank for the*

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others. Since we have already reported beneficiary information under the first activity we set up, we will return to that activity to include beneficiary information about this activity.

8. Return to the MAIN MENU and select REVISE ACTIVITY. Select the ESG activity which you previously set up and reported beneficiary information under.

9. Move through the initial set up screens using **<F8>** until you reach the MONEY screen, and select ESG. Save your work and move to the "ESG HOUSING AND SERVICES" screen. If you need to report additional beneficiary data make appropriate entries on this screen. Save your work and move to the first of three "ESG BENEFICIARIES" screen.

    ✐ *Keep in mind that part of the reason we are reporting this way is to avoid double counting beneficiaries. When you are reporting in your office you may want to consider ahead of time how this can most easily be accomplished.*

10. This screen may only be filled out after a shelter has been in operation. It may be left blank at the time an ESG activity is set up or, if the shelter is already in operation, it may be possible to fill it out. After typing in any new data, save your work and move to the second "ESG BENEFICIARIES" screen.

11. Continue to move through the beneficiary screens, updating information as necessary, until you come back to the "Money" screen. Be sure to save any changes before moving on to the next screen in the ESG path.

12. Return to the MAIN MENU.

13. Select ACTIVITY FUNDING, commit the funds for the second ESG activity that you set up, and return to the MAIN MENU.